

ABSTRACT

A database in conjunction with a workflow management system is provided to store information on a plurality of potential customers and to manage each potential customer through a marketing and sales campaign. The product is designed to be hosted by either an Internet Service Provider ("ISP") or an Application Service Provider ("ASP"), and may also be accessible through a global computer network. Alternatively, the product may be hosted on a company specific server with browser front-end access via an Intranet Server or a computer connected to a local area network. The accessibility of the product enables account holders to view the status of their potential customers from anywhere around the world at any time. Potential customers may be entered into the database either manually or through an import from an external source. The origination of a potential customer in terms of how they came to the attention of the marketing personnel is determinative of where they originate in the workflow. As the potential customers are tracked through the workflow they are contacted by marketing personnel and, based upon the reaction provided by the potential customer, the customer progresses to different areas of the workflow. In addition, should the marketing personnel responsible for any specific lead at a particular station within the workflow be tardy in establishing contact with the potential customer, a message is automatically generated and forwarded to a person responsible for supervising the assigned marketing or sales personnel. The database further comprises report generating capabilities for generating custom reports upon request, or generating periodic reports at programmed intervals. The reports may be forwarded to all appropriate user through an electronic mail message, or other more conventional avenues of communication. Accordingly, the database in conjunction with the workflow enables all potential customers entered into the database to be managed in an organized manner throughout all stages of a marketing and sales campaign.